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## Integration Partner Integration & Leadership Executive Achievement Report (Deliverable 126.1.1b) March 2003

### **Executive Summary**

Integration Partner supports FSA leadership's establishment of actions required to drive the development of integration projects and initiatives. This report summarizes Integration Partner's activities for the month of March that support the development of integration projects and initiatives.

There have been multiple task orders awarded over the month that will enable us to contribute to the achievement of overall integration goals. We continue to work with FSA's Business Integration Group (BIG) to shape several key work products that will be crucial in identifying and managing the dependencies and sequencing of integration efforts across the program.

Moving forward, there are a couple of integration areas where we see that action and/or progress is needed. First, further understanding is needed around the Application Processing/CPS area. Secondly, it is imperative that the NSLDS integration activities be expedited in order to link the integration efforts related to Data Strategy and Common Origination and Disbursement with a future NSLDS solution and the overall enterprise data solution.

### **Leadership**

#### Support & Direction Setting

Integration Partner senior leadership provides FSA leadership and the project managers, business architects, and technical architects on the Integration Partner program with the key leadership oversight, enterprise focus, and strategic direction to fulfill the goals of FSA's integration program.

Integration Partner senior leadership has been working with FSA leadership via weekly client meetings to address the following topics:

- ✓ Task order status
  - Key integration task order awards for the month of March include the following:
    - Common Services for Borrowers
    - Security & Privacy Architecture
    - Enterprise Data Strategy
    - Case Management
    - EDPIN Reengineering
    - Portal Rollout Strategy
- ✓ Key delivery issues specific to major integration initiatives including the resolution of OGC and OMB issues enabling the release of the eZ-Audit solution, and the further development of the Students Portal Release 2.
- ✓ Contracts/Invoicing
  - Integration Partner continues to work closely with FSA to improve the contract task order approval process.

- Integration Partner continues to meet with FSA senior leadership regarding the final CRM4FSA invoice.
- Integration Partner continues to discuss with FSA senior leadership the eServicing task order and changing environment.

Integration Partner senior leadership continues to provide leadership direction and oversight relating to the following:

- ✓ Resource staffing and organizing projects around newly awarded task orders.
- ✓ Re-organizing the program delivery structure, to include establishment of smaller working groups, to improve communication links between projects and ensure alignment around critical path, or integration focus areas.
- ✓ Providing guidance and direction to Integration Partner teams to ensure overall program goals are achieved.

## **Integration**

### Integration Progress

The following synopsis outlines progress towards major initiatives within the Integration Partner program, including Enterprise Data Strategy, Integrated Partner Management-Case Management & School Oversight (CMO), Common Origination and Disbursement (COD), Common Services for Borrowers (CSB) and Application Processing.

### **COD**

- ✓ The COD solution continues to move forward towards Release 2.0. Due to the compressed schedule and issues identified during testing, the SIT and UAT testing phases are behind schedule. Therefore, a joint FSA and Integration Partner decision was made to postpone the implementation date of Release 2.0 to April 14<sup>th</sup>. Meanwhile, development has begun for Release 2.1 and functional design for Release 2.2. Release 2.0 will provide FSA with a core, single integrated solution to manage aid originations and disbursements and builds upon the existing, functioning COD solution released in 2002.

### **CSB**

- ✓ Integration Partner is providing the FSA CSB team with support in development of FSA's Statement of Objectives outlining specific parameters, integration requirements, and business goals for the Common Services for Borrowers solution competition.

### **Enterprise Data Strategy**

- ✓ Additional scope definition has taken place regarding FSA's overall enterprise data strategy. The Enterprise Data Strategy project will define FSA's enterprise data vision and its overall enterprise data strategy. Current scope includes:
  - Define an overall Data Strategy framework.
  - Define FSA Technical Strategies to identify the current-state and future direction of the following key technology areas: Portals, Web Services, Data Access and Storage, Internal Data Exchange, External Information Access (FSA Gateway).
  - Define a strategic vision for an FSA XML Framework.

- Define Common Identifiers for mapping and accessing student/borrower and schools data across the FSA Enterprise.
- Optionally define business objectives and high-level requirements for institution enrollment and access management.
- ✓ The draft XML ISIR Schema has been developed.
- ✓ A Common Student Identifier (CSID) consensus meeting was held with FSA business owners to review efforts to date regarding CSID, outcomes of previous working sessions and potential solution implementation methods, considerations and needed process improvements. Major outcomes included FSA agreement to move forward with a matching algorithm approach. Next steps include:
  - Conduct further working sessions to define exact business rules for the matching algorithm
  - Conduct working sessions with each functional group to begin defining process changes and identify where the matching algorithm would be use
  - Conduct meetings with technical architecture groups to work on technical solution high-level design

**Integrated Partner Management**

- ✓ Efforts are currently underway to review and document current business processes, compile the as-is high-level PEPS requirements and complete the high-level target state definition and sequencing plan.
- ✓ The eZ-Audit system was released on April 1, 2003, providing a paperless single point of receipt and access for financial statements and compliance audits through fully accessible, web-based application that immediately directs the most high-risk reports to Case Teams as part of their role to oversee the Title IV program funds. This application replaces the current manual Document and Receipt Control Center operations. Integration Partner is providing production stabilization support through the end of May.

**Application Processing**

- ✓ The ED PIN Reengineering project will provide an analysis on the capacity and future expansion of the ED PIN site to support additional FSA business processes.
- ✓ The Portal Rollout Strategy project will focus on the deployment of the Students Portal Release 2.0. Release 3.0 activities will begin following the deployment of Release 2.0 in May.

**Participation in FSA Business Integration Group**

The Integration Partner provides business, technical and integration support to FSA's BIG. Integration Partner supports BIG discussions, assists with target state of FSA's enterprise integration vision, ensures alignment of the business and technical architecture, helps to identify major integration dependencies and charts the major integration and operations timelines.

Accomplishments have included involvement in key integration discussions and presentations, continued management of project dependencies and related timelines among FSA's various integration

projects and initiatives, meeting minute/action item documentation and management of the agenda for future BIG meetings.

Key integration discussions and decisions for the month of March included:

- ✓ FSA Integration Vision
  - FSA CIO reviewed with business owners the draft enterprise Integration Vision.
  - It was identified by the BIG that the strategic themes of the document need to more accurately reflect FSA's business areas and that future business processes and solutions should be more detailed to reflect what FSA envisions them to do. Furthermore, it was identified that FSA does not have a customer support strategy.
- ✓ NSLDS/SSCR/Transfer Monitoring
  - NSLDS enhancements were reviewed with the group.
  - FSA CIO advised NSLDS to prioritize needs and evaluate how efforts will feed into the NSLDS reengineering project.
  - Dependencies relating to school reporting, notification and tracking were identified for NSLDS and Case Management. It was determined that a small group comprised of NSLDS and Case Management resources will conduct short-term analysis to determine how to deal with the related data and confirm next steps.
  - It was noted that NSLDS should consider the products being developed out of the Data Strategy effort when weighing enhancement priorities.
- ✓ Timeline Discussion
  - A draft view of the future Integrated FSA Sequencing Plan was presented and reviewed with the group. This document informs planning of investment initiatives by providing a consolidated view of constraints and an integrated view of timelines and dependencies across major integration initiatives.
  - Multiple views were discussed: Data Strategy, Application Processing, Integrated Partner Management, Common Services for Borrowers and a summary view.
  - The Integrated Sequencing Plan was presented to Management Council on March 21, 2003, as a BIG working product.

#### FSA Integration Vision

The Integration Partner completed the draft of the Integration Vision in coordination with the FSA Deputy CIO and submitted a final draft as part of the Integration & Leadership task order. The FSA BIG has reviewed the draft Integration Vision and provided comments to FSA's CIO office.

#### Integration Dependency Tracking

In order to align the Integration Partner program with the business needs and strategic objectives of FSA, dependencies and related impacts for key integration initiatives must be identified. The Integration Partner continues to identify, track and manage project dependencies, which are maintained through multiple documents. The Dependency Tracking Log continues to be under

development with the FSA BIG and Integration Partner project managers and architects. This document will also help identify milestone gaps among the major integration initiatives.

#### Integrated Sequencing Plan

Sequencing plans for key integration initiatives must also be managed at the program level. The Integration Partner maintains the program schedule (Integrated Master Schedule) which tracks task order begin and end dates, major milestones and future projects. See attached document, Integrated Master Schedule (as of April 4, 2003).

Additionally, with assistance from the FSA BIG, Integration Partner has developed the draft Integrated FSA Sequencing Plan views (Data Strategy Data Strategy, Application Processing, Integrated Partner Management, Common Services for Borrowers and a summary view). These views help to inform planning of investment initiatives by providing a consolidated view of constraints and an integrated view of timelines and dependencies across major integration initiatives. See attached document, FSA Sequencing Plan DRAFT 04012003.

#### Integration Issues & Gaps

The following synopses summarize concerns and/or gaps around major integration initiatives within the Integration Partner program.

- ✓ Progress continues to be made within the Data Strategy initiative to address the development of an XML Framework that takes into account ISIR needs and requirements within CPS. Integration Partner would like to better understand these requirements and needs in order to determine how this and related projects fit into the overall integration vision and to ensure integration is being achieved across the program. It is important that discussions addressing this and other major upgrades for the CPS system (EDExpress, Multi-year Database) begin so there is integration coordination among FSA's activities. These efforts play a large role in the solution coordination with the student identifier (CSID), and development of future integrated views.
- ✓ The long-term direction for NSLDS reengineering needs to be defined. Without this direction, the overall Data Strategy cannot be finalized, specifically the Quality Assurance Plan and data cleanup efforts. Additionally, major dependency gaps exist between the future NSLDS and other major integration initiatives (Data Strategy, Common Student Identifier, Case Management, Common Services for Borrowers), preventing achievement of an overall enterprise data solution.

#### Integration Efforts Planned for April 2003

The Integration Partner will focus on further developing the following integration areas: Common Origination and Disbursement, Common Services for Borrowers, Integrated Technology and Data Strategy, NSLDS Reengineering, Integrated Partner Management, Application Processing and CRM4FSA.

#### **Enterprise Data Strategy**

- ✓ The following efforts are planned for the month:
  - Continued definition of the Technology Strategies business objectives.

- Continued definition of the business objectives and as-is data flows for the overall Data Strategy effort.
- Continued formalization of the XML Strategy and Approach.
- Continued development of approach documents and detailed requirements for the school identifier.
- Continued development of the conceptual design for the student identifier.
- Development of business objectives and high-level requirements for institution enrollment and access management.

**Integrated Partner Management**

- ✓ April efforts will include continued documentation of the as-is requirements for PEPS and CMO and development of the CMO Target State.
- ✓ eZ-Audit will continue production stabilization efforts through May.

**COD**

- ✓ The COD solution will continue to move forward towards Release 2.0, with testing and deployment activities scheduled for April.

**CSB**

- ✓ CSB April activities include development of support documents related to the Integrated CSB SOO.
- ✓ Integration Partner will address any responses or questions to the eServicing letter of intent.

**Application Processing**

- ✓ April activities for ED PIN Reengineering Analysis include continued efforts to establish ED PIN as an Enterprise authentication service. This activity will include updating requirements, the technical architecture and associated capacity plans.
- ✓ April activities for Portal Rollout Strategy include Students Portal Release 2.0 performance and regression testing.

**NSLDS Reengineering**

- ✓ No activity is planned.

Integration Partner will participate in the following tentatively scheduled FSA BIG discussions for the month of April:

- ✓ 4/1: Security Workshop
- ✓ 4/3: EAI, ITA
- ✓ 4/8: Data Strategy Resource Requirements
- ✓ 4/10: Staging Environment
- ✓ 4/15: FSA/BIG Visioning
- ✓ 4/17: Conference Themes
- ✓ 4/22: Akamai, Usability Testing
- ✓ 4/24: Security Architecture Workshop



✓ 4/29: Reauthorization

Integration Partner will provide support to FSA as they continue to define and shape their strategic vision, as well as outline the target state business architecture and develop integrated views of Integration Partner and operating partner initiatives to help identify major integration gaps.